



Crystal Gateway Marriott Hotel  
1700 Jefferson Davis Highway  
Arlington, Virginia 22202

**Confirmed Speakers as of January 22, 2003**

**WEDNESDAY, FEBRUARY 19, 2003**

5:00 - 8:30 p.m. REGISTRATION

**THURSDAY, FEBRUARY 20, 2003**

7:00 a.m. - 5:30 p.m. REGISTRATION

7:15 - 8:15 a.m. CONTINENTAL BREAKFAST

**8:30 a.m. - 12:30 p.m. PLENARY SESSIONS**

8:30 a.m. WELCOME  
James Moseley, Deputy Secretary, USDA

8:40 - 9:30 a.m. 2003 MARKET AND POLICY PROSPECTS  
Moderator  
James Moseley, Deputy Secretary, USDA

2003 Agricultural Prospects  
Keith Collins, Chief Economist, USDA

U.S. Trade and Agricultural Policy  
J. B. Penn, Under Secretary for Farm and Foreign Agricultural Services

9:30 - 10:00 a.m. KEYNOTE ADDRESS  
Moderator  
James Moseley, Deputy Secretary, USDA

Keynote Address  
Secretary of Agriculture Ann M. Veneman

**10:00 - 10:30 a.m. INTERNATIONAL ECONOMIC AND FINANCIAL CONDITIONS**

International Financial Economical Developments  
John Taylor, Under Secretary of Treasury for International Affairs

**10:30 - 11:00 a.m. REFRESHMENT BREAK**

11:00 a.m. - 12:30 p.m. DISTINGUISHED PANEL: COMPETING IN THE 21ST CENTURY  
Moderator  
Dan Kelley, Chairman of the Board and President, GROWMARK

Trade Policy and International Competition  
Greg Estep, Senior vice President, ConAgra Foods, Inc.

Opportunities Created by Changing Consumer and Market Demands  
Bruce Peterson, Senior Vice President for Perishables, Wal-Mart Stores, Inc.

The Impact of Demands For Environmental Quality in the United States and Elsewhere  
Nancy Bryson, General Counsel, USDA

How is the Changing Structure of Farming and Agribusiness Affecting Competitiveness?  
John Johnson, CEO, CENEX Harvest States Cooperatives

12:30 p.m. EXHIBIT HALL OPENS

12:30 - 1:15 p.m. NETWORKING LUNCHEON

1:15 - 1:45 p.m. MAGAZINE DEBUT  
USDA's Economic Research Service unveils a new publication

1:45 - 3:30 p.m. CONCURRENT SESSIONS

#### CENTRAL AND EASTERN EUROPE: IMPACT OF EU ENLARGEMENT ON THE EXPORT COMPETITIVENESS OF AGRICULTURE AND FOOD INDUSTRIES

Moderator  
Robert Curtis, U.S. Agricultural Counselor to Austria

Profile of a Larger European Community  
Robert Curtis, U.S. Agricultural Counselor to Austria

Overview of EU Enlargement and Its Impact on Primary Commodity Markets  
Chris Horseman, Director, Agra Europe

The View from Central and Eastern Europe  
Laszlo Vajda, Director, Department of European Integration, Hungarian Ministry of Agriculture

Future Competitiveness of CEEC Packaged Food and Beverage Manufacturers  
Anne Nugent, Project Coordinator, Euromonitor Plc.

#### FARM ORGANIZATION ROUNDTABLE ON COMPETING IN THE 21ST CENTURY

Moderator  
Charles Lambert, Deputy Under Secretary for Marketing and Regulatory Programs, USDA

#### PANELISTS:

David J. Frederickson, President, National Farmers Union  
Ron Warfield, President, Illinois Farm Bureau  
Dan Kelley, Chairman of the Board and President, GROWMARK, Inc.  
Additional panelist to be announced

#### RURAL ECONOMIC OUTLOOK AND IMPLICATIONS FOR FARM HOUSEHOLDS

Moderator  
Thomas D. Rowley, Fellow, Rural Policy Research Institute, Editor, Rural Health News

Rural America Entering the 21<sup>st</sup> Century: Forces of Change  
Rodney J. Brown, Deputy Under Secretary for Research, Education and Economics, USDA

Economic Outlook for Farm Households and Their Farming Establishments  
Ashok Mishra, Agricultural Economist, Economic Research Service, USDA

New Programs to Benefit Rural Households and Businesses  
Thomas C. Dorr, Under Secretary for Rural Development, USDA

Critical Development Issues in Rural Economies  
Stephan J. Goetz, Professor, Agricultural and Regional Economics, The Pennsylvania State University, and  
Director, Northeast Regional Center for Rural Development

EL NINO'S IMPACT ON AGRICULTURE  
Moderator to be announced

The Impact of the El Nino Phenomenon on the United States  
Jim Laver, Director, Climate Prediction Center, National Oceanographic and Atmospheric Administration, U.S.  
Department of Commerce

El Nino's Effects on Major World Crop Areas  
Steve Zebiak, Acting Director, International Research Institute for Climate Prediction, Columbia University

Private Forecaster's Perspective  
Gail Martell, President, Martellcropprojections.com

EMERGING FOOD SAFETY ISSUES IN U.S. AND FOREIGN MARKETS  
Moderator  
Elsa Murano, Under Secretary for Food Safety, USDA

Emerging Strategies for Managing Food Safety  
Dr. Frank Busta, Professor of Food Science and nutrition, U of Minn retired

Food Safety Standards: Trade Barrier or Trade Enhancement?  
Dr. Laurian Unnevehr, Professor, Department of Agricultural and Consumer Economics, University of Illinois at  
Urbana-Champaign

Additional topic and speaker to be announced

3:30 - 3:45 p.m. REFRESHMENT BREAK

3:45 - 5:30 p.m. CONCURRENT SESSIONS

BRAZIL: COMPETITION IN GLOBAL MARKETS  
Moderator  
William W. Westman, U.S. Agricultural Counselor to Brazil

Paying the Bills in Brazil: Does the IMF's Math Add Up?  
Dean Baker, Director, Center for Economic Policy and Research

A Private Sector View on Brazil's Competitive Position

Antonio Sartori, President, BRASOJA Corretora de Cereias Consulting

Ports, Inland Transportation, and Other Infrastructure Developments

Jose Vicente Caixeta-Filho, Department Head, Department of Economics, Luiz de Queiroz College of Agriculture, University of Sao Paulo

Competitiveness of the Pork, Poultry, and Beef Industries

Constanza Valdes, Agriculture Economist, Economic Research Service, USDA

## LIVESTOCK PRODUCER INITIATIVES FOR COMPETING IN THE 21ST CENTURY

Moderator

Randall Torgerson, Agricultural Economist, USDA retired

Organizational Initiatives of Iowa Beef Producers

Joel Brinkmeyer, President, Iowa Quality Beef Supply Cooperative

Critical Needs of Eastern Corn Belt Pork Producers

Brian Watkins, Chairman, Great Lakes Cooperative

The Creation of Dakota Lamb Growers Cooperative

David Merwin, CEO, Dakota Lamb Producers

Developing Natural and Certified Organic Beef Programs

Diana Endicott, Program Manager, Rainbow Organic

## 2002: PUTTING NEW CROP INSURANCE PROGRAMS TO THE TEST

Moderator

Ross J. Davidson, Jr., Administrator, Risk Management Agency, USDA

The Federal Crop Insurance Program: Opportunities and Challenges

Barry J. Barnett, Professor, Department of Agricultural & Applied Economics, University of Georgia

If Crop Insurance Is Working, Why Do Farmers Need Disaster Assistance?

Glenn Arthur Barnaby, Jr., Professor, Department of Agricultural Economics, Kansas State University

Livestock Price Protection Insurance: A New Dimension To Managing Risk and Its Impact on Forage and Rangeland Insurance Programs

Peter W. Griffin, President, Applied Analytics Group, Inc.

## CONTROLLING NEW INVASIVE AND EXOTIC PESTS AND DISEASES

Moderator

Anne Vidaver, Head of the Department of Plant Pathology, University of Nebraska

Invasive Diseases in Animals and Prevention

Carole Bolin, Section Chief for Bacteriology and Mycology, Diagnostic Center for Animal Health, Michigan State University

#### Establishing a Disease Diagnostic Network

Terry McElwain, College of Veterinary Medicine, Washington State University; Executive Director of the Washington Animal Disease Diagnostic Laboratory; Director of the Animal Health Research Center; and President, Association of American Veterinary Laboratory Diagnosticians.

#### Invasive Plant Diseases and Pests

Jacqueline Fletcher, Sarkeys Distinguished Professor, Department of Entomology and Plant Pathology Oklahoma State University

#### How to Combat Invasive Diseases and Pests

Richard Ward, Associate Professor, Michigan State University, and Co-Chair of the U.S. Wheat and Barley Scab Initiative

#### THE EFFECTS OF TRANSPORTATION ON COMPETITIVENESS OF U.S. AGRICULTURE

##### Moderator

Barbara C. Robinson, Deputy Administrator, Transportation and Marketing Programs, Agricultural Marketing Service, USDA

#### Transportation's Role in Competing in Global Agricultural Markets

Bill Motes, Senior Vice President, Sparks Companies, Inc.

#### Transportation Capacity Issues on the Upper Mississippi/Illinois River Systems

Chris Brescia, President, Midwest Area River Coalition 2000

#### Rail Services and Capacity Effects on Agriculture

Gene Griffin, Director, Upper Great Plains Transportation Institute, North Dakota State University

#### Importance of Intermodal Connectivity and Bottleneck Elimination

Barry Prentice, Director, Transport Institute; Association Professor, Department of Agricultural Economics, University of Manitoba

#### FORCES SHAPING AMERICA'S EATING HABITS

##### Moderator

Peter Murano, Deputy Administrator, Food and Nutrition Service, USDA

#### Food Consumption in America: Looking Ahead to 2020

James Blaylock, Associate Director, Food and Rural Economics Division, Economic Research Service, USDA

#### Food Politics: How the Food Industry Influences Obesity

Marion Nestle, Professor and Chair, Department of Nutrition and Food Studies, New York University

#### Initiatives and Partnerships in Influencing America's Diet

Barbara Berry, Vice President for Programs, Produce for Better Health Foundation

#### How Is the Food Service Sector Responding to Health and Demographic Trends?

Sheila Cohn, Manager, Nutrition Policy, Health and Safety Regulatory Affairs, National Restaurant Association

5:30 - 6:30 p.m. CASH BAR RECEPTION

6:30 p.m. FORUM DINNER  
Betsy Holden, President and CEO, Kraft Foods, Inc.

**FRIDAY, FEBRUARY 21, 2003**

7:00 a.m. - 9:00 p.m. REGISTRATION

7:15 a.m. - 2:15 p.m. EXHIBIT HALL OPEN

7:15 - 8:15 a.m. CONTINENTAL BREAKFAST

8:15 - 10:00 a.m. CONCURRENT SESSIONS

**OUTLOOK FOR GRAINS AND OILSEEDS**

Moderator

James R. Little, Administrator, Farm Service Agency, USDA

USDA Outlook for Grains and Oilseeds in 2003

Peter Riley, Agricultural Economist, Farm Service Agency, USDA

Private Sector Outlook for Grains and Oilseeds in 2003

Dale Gustafson, Analyst, Salomon Smith Barney

The Impact of Growing Ethanol Byproduct Production on Livestock Feed Market Markets

John Urbanchuk, Executive Vice President, AUS Consultants

**NEW MARKETABLE PRODUCTS FROM ANIMAL WASTE**

Moderator

Lawrence Clark, Deputy Chief for Science and Technology, Natural Resources Conservation Service, USDA

Potentials for Energy from Animal Waste Digesters

Dennis Haubenschild, Dairy Farmer, Princeton, Minnesota

Commercial Fertilizer from Poultry Litter: The Case of Harmony Products

Vernon Meacham, Vice President for Technology, Harmony Products, Inc.

Thinking Outside the Box: Building Materials and Other Products from Animal Processed Fiber

Tom Richards, Assistant Professor, Agricultural and Biosystems Engineering, Iowa State University

**INTERNATIONAL TRADE AGREEMENTS AND U.S. SUGAR POLICY**

Moderator

James Grueff, Assistant Deputy Administrator, International Trade policy, Foreign Agricultural Service, USDA

Implementation of U.S. Sugar Policy and Trade Agreement Effects

Jack Roney, Director of Economics and Policy Analysis, American Sugar Alliance

Overview of Implications of the WTO and Other Agreements on U.S. Sugar Policy

Don Phillips, Trade Advisor, American Sugar Alliance

U.S. Mexican Sweeteners Issues for Sugar Producers

Don Carson, Executive Vice President, Florida Crystals Corporation

U.S. Mexican Sweeteners Issues for Sugar Producers for Corn Refiners  
J. Patrick Mohan, Chairman, Corn Refiners Association, Inc. and President of Support Services,  
Tate & Lyle North America, Inc.

#### **BUILDING TRADE CAPACITY IN DEVELOPING COUNTRIES** Ellen Terpstra, Administrator, Foreign Agricultural Service, USDA

Meeting the Challenges of Trade Capacity Building in Developing Countries: The Asian Perspective  
K.J. Weerasinghe, Minister/Permanent Representative to the World Trade Organization, Democratic  
Socialist Republic of Sri Lanka  
A Multilateral Development Bank's Role in Trade Capacity Building: Latin America and the Caribbean  
Ennio Rodriguez, Principal Economist, Integration and Regional Programs Department, Inter-American  
Development Bank

Private Sector Benefits from Trade Capacity Building: A South African Case Study  
R. Brinkley Seward, Director of Membership Development, International Association of Refrigerated Warehouses  
and the World Food Logistics Organization

Lessons Learned from U.S. Government Trade Capacity Building Programs  
Suzanne Heinen, Acting Deputy Administrator for International Cooperation and Development, Foreign  
Agricultural Service, USDA

#### **WHAT'S HAPPENING IN THE RETAIL FOOD SECTOR?** Moderator

Ephraim Leibtag, Agricultural Economist, Economic Research Service, USDA

Retail Food Stores: Current Practices and Trends  
Speaker to be announced

New Technologies in Retail Food Stores  
Glen Terbeek, Director and Advisor, Breakaway Strategies

Smaller Scale, Better Returns  
Speaker to be announced

10:00 a.m.

#### **BRIEFING ON 2003 RETAIL FOOD PRICES**

Ephraim Leibtag, Agricultural Economist, Economic Research Service, USDA

10:00 - 10:30 a.m. REFRESHMENT BREAK

10:30 a.m. - 12:15 p.m. CONCURRENT SESSIONS

#### **WORLD TRADE ORGANIZATION AGRICULTURE NEGOTIATIONS: MODALITIES AND BEYOND** Moderator

Joseph O'Mara, President of O'Mara & Associates

U.S. Position and Perspectives  
David Hegwood, Special Counsel to the Secretary of Agriculture

Cairns Group's Position and Perspectives

Speaker to be announced

Developing Countries' Position and Perspectives

K.J. Weerasinghe, Minister/Permanent Representative to the World Trade Organization, Democratic Socialist Republic of Sri Lanka

NEW CONSERVATION PROGRAMS AND PARTNERSHIPS

Moderator

Bruce Knight, Chief, Natural Resources Conservation Service, USDA

How Public Sector Technical Service Providers Will Participate

Gary Mast, First Vice President, National Association of Conservation Districts

How Private Sector Technical Service Providers Will Participate

Luther Smith, Executive Vice President, Certified Crop Advisers

The Promise and Perils of Technical Service Providers

Craig Cox, Executive Vice President, Soil and Water Conservation Society

Practical Experiences with the New Programs and Partnerships

Venessa Bogenhlom, President, VB Agricultural Services and Farms

OUTLOOK FOR COTTON AND FIBERS

Moderator

Patrick T. McClatchy, Broker, Rosenthal Collins Group and Executive Director, Ag Market Network

The U.S. and World Cotton Outlook

Stephen MacDonald, Agricultural Economist, Economic Research Service, USDA

U.S. Cotton Supply Response Under the 2002 Farm Act

Paul C. Westcott, Agricultural Economist, Economic Research Service, USDA

Focusing on the Demand Side of the Equation

Allen Terhaar, Executive Director, Cotton Council International

Trade Policy Developments Affecting Cotton

Mechel S. Paggi, Director, Center for Agricultural Business, California State University, Fresno

OUTLOOK FOR LIVESTOCK AND POULTRY

Moderator to be announced

The 2003 Outlook for Livestock and Poultry

Shayle Shagam, Agricultural Economist, World Agricultural Outlook Board, Office of the Chief Economist, USDA

U.S. Views on Livestock Traceability

Speaker to be announced

Canada's Experience with Cattle Identification

Brad Wildeman, Chairman, Canadian Cattle Identification Agency



## TRANSITIONS IN MARKETS FOR AGRICULTURAL INFORMATION

Moderator

Susan Offutt, Administrator, Economic Research Service, USDA

Changes in the Information Marketplace

Steve Custer, Publisher, Farm Journal and Top Producer, Farm Journal Media

Are Futures Markets More or Less Important in Generating Price Information?

Scott Irwin, Professor, University of Illinois

Integrating Hemispheric Market Information

Sandra Cuellar, Executive Committee Member and Delegate of Colombia, Market Information Organization of the Americas

12:15 - 12:45 p.m. REFRESHMENT BREAK

12:45 - 2:15 p.m. LUNCHEONS

## GRAINS AND OILSEEDS LUNCHEON

Topic and speaker to be announced

## SUGAR AND SWEETENERS LUNCHEON

Moderator

Beth Bechdol, Special Assistant to the Under Secretary for Farm and Foreign Agricultural Services, USDA

International Trade Agreements: The Caribbean/Central American View

Jose A. Orive, Executive Director, Central American Sugar Association

## COTTON AND FIBERS LUNCHEON

Moderator

Keith Collins, Chief Economist, USDA

The Changing Landscape of World Textile Trade: Challenges and Opportunities for U.S. Cotton

Julia Hughes, Vice President, International Trade and Government Relations, U.S. Association of Importers of Textiles and Apparel

## LIVESTOCK AND POULTRY LUNCHEON

Topic and speakers to be announced

## HORTICULTURE LUNCHEON

Moderator

Neil Conklin, Director, Market, Trade and Economics Division, Economic Research Service, USDA

Speaker to be announced

2:15 - 4:00 p.m. CONCURRENT SESSIONS

## COMPETITION IN THE ASIAN MARKETPLACE: PROSPECTS AND CONSTRAINTS

Moderator

Walter J. Armbruster, President, Farm Foundation

China Goes Shopping: Does Transportation and Infrastructure Matter?

William Hall, Partner, Seaport Consultants

India: Changing Developments in Food Markets and Agribusiness Environment

Hardeep Singh, President, Indian Sub-Continent, Cargill India Pvt. Ltd.

Southeast Asia: Globalization of the Retail Sector

Dee Richmond, Deputy Director, Food Export USA-Northeast

## CHALLENGES OF COMPLYING WITH AIR AND WATER QUALITY REGULATIONS

Moderator

Jean-Mari Peltier, Counselor to the Administrator, Environmental Protection Agency

Agriculture: Operating in an Era of Regulation

Mark Jekanowski, Sparks Companies, Inc.

Comparative Regulation of Livestock Operations in Canada, Mexico, and the United States

Tim Whitehouse, Head, Law and Policy Program, North American Commission for Environmental Cooperation

Air Quality Regulation Challenges for Agriculture

Robert Flocchini, Director, University of California at Davis, Crocker Nuclear Laboratory

Water Quality Regulation Challenges for Agriculture

Sandra Batie, Elton R. Smith Professor in Food & Agricultural Policy, Department of Agricultural Economics, Michigan State University,

## OUTLOOK FOR TOBACCO

Moderator

Darryl Jayson, Vice President Tobacco Merchants Association

Opportunities for U.S. Tobacco Exports

Tommy Bunn, Executive Vice President, Leaf Tobacco Exporters Association and Tobacco Association of United States

Issues Facing U.S. Tobacco Growers

Will Snell, Extension Professor, University of Kentucky

U.S. Tobacco Situation and Outlook

Tom Capehart, Senior Economist, Economic Research Service, USDA

The USDA Tobacco Program

Dan Stevens, Agricultural Economist, TPD Farm Service Agency, USDA

## OUTLOOK FOR MILK AND DAIRY PRODUCTS

Moderator

A.J. Yates, Administrator, Agricultural Marketing Service, USDA

The 2003 Outlook for Milk and Dairy Products

Howard McDowell, Senior Economist, Dairy Programs, Agricultural Marketing Service, USDA

A Producer's Outlook on Being Competitive in the Dairy Sector

Donald Bennink, North Florida Holsteins, Bell, Florida, Invited

Developing New Dairy Products for Domestic and Foreign Consumers

Speaker to be announced

OUTLOOK FOR THE FLORICULTURE, GREENHOUSE, AND NURSERY INDUSTRIES

Moderator

Steven Wiyatt, Director, Statistics Division, National Agricultural Statistics Service, USDA

Labor Issues in the Floriculture and Nursery and Industries

Craig J. Regelbrugge, Senior Director of Government Relations, American Nursery & Landscape Association

Globalization of the Industry

Marvin N. Miller, Market Research Manager, Ball Horticultural Company

Economic and Marketing Issues from a Grower's Perspective

Robin G. Brumfield, Extension Specialist in Farm Management, Rutgers, The State University of New Jersey

**4:00 p.m.      ADJOURN**